

United States District Court
Southern District of Alabama

REQUEST FOR QUOTATION

RFQ Number/Name: **USDC-SDAL-10-002 – WordPerfect to Microsoft Word Conversion**
Request Date: March 12, 2010

TO: WHOM IT MAY CONCERN

This is a request for Open Market Pricing.

Quotes may be faxed or emailed with company letterhead to the below listed address by **Friday, April 2, 2010, at 5:00 P.M. Central Daylight Time**. However, hand carried quotes are to be delivered by the same time at **113 Saint Joseph Street, Room 134, Mobile, Alabama, ATTENTION: Patrick G. Shubird.**

Submit a technical proposal describing your approach and project management in accordance with the attached Statement of Work. Use the attached quote sheet for a price quotation broken down by task with any supporting documentation for the price attached. Decision to award will be made for all Tasks or for Tasks 1, 3, and 4 by **April 15, 2010**, pending availability of funds.

A fixed price award from the RFQ will be made based on lowest price, technically acceptable offer and is subject to all Provisions and Clauses listed under ***Provisions, Clauses, Terms and Conditions – Small Purchases*** (attached).

Quotes and questions concerning this RFQ should be addressed to:

Patrick G. Shubird, Contracting Officer
U.S. District Court for the Southern District of Alabama
113 Saint Joseph Street
Mobile, Alabama 36602
Phone: 251-694-4672
Fax: 251-694-4297
E-Mail Address: Pat_Shubird@alsd.uscourts.gov

The Delivery Addresses for this project will be:

U.S. District Court for the Southern District of Alabama
113 Saint Joseph Street
Mobile, Alabama 36602

Quote Sheet for RFQ Number USDC-SDAL-10-002
(Use additional sheets if necessary)

Item #	Description	Tasks	Quantity	Unit	Unit \$	Extend \$
1	Task 1 – Conversion of macros, templates, merge files	See Scope, section 1.3, in the Statement of Work	Templates – approx. 50 Macros – approx. 200 Merge files – approx. 200			
2	Task 2 – Conversion of documents	See Scope, section 2.3, in the Statement of Work	Approx. 75,000			
3	Task 3 – Functionally in Word 2007	See Scope, section 3.3, in the Statement of Work				
4	Travel Expenses	See F- Environment, Location, in the Statement of Work	1 Location			

GRAND TOTAL:

Vendor's Name

Vendor's Phone Number

Vendor's Street Address

Vendor's City/State/Zip

Signature of Authorized Person

Date

Tax ID Number

Printed or Typed Name of Signer

Qty Discount

Discount Terms

Performance Start Date

Vendor Fax Number

Vendor E-Mail Address

Statement of Work

A. DESCRIPTION OF TASKS

Task 1: Conversion - Macros/Templates/Merge Files

1.1 Introduction

The U.S. District Court for the Southern District of Alabama has been using Corel WordPerfect as its word processing system for more than 20 years. Over the years, the Court has progressed, moving through each version of software as it has been released. Currently, the Court uses WordPerfect X3. In addition to documents, WordPerfect macros, templates, and WordPerfect DOS keyboard shortcuts are used by District Court staff on a daily basis. The Court would like to move from WordPerfect to Microsoft Word 2007 as its standard word processing software for Court documents.

1.2 Purpose

All official Clerk's Office and Chambers macros and templates will be converted to or recreated in Microsoft Word 2007. A user-specified set of each staff member's current WordPerfect macros, templates, and merge files will also be converted to or recreated in Microsoft Word 2007.

1.3 Scope

Vendor will convert merge files and templates using vendor-supplied conversion software. Documents will be reviewed by vendor and designated court staff for accuracy of conversion. Vendor will convert (using vendor-supplied conversion software) or recreate macros in Word 2007. Macros will be tested for functionality by vendor and designated court staff. If conversion software is developed by Vendor, Vendor will provide this software for conversion of documents. Vendor will also train Court IT staff on its use. If conversion software selected by vendor is from another source, the U.S. District Court for the Southern District of Alabama will purchase an adequate number of licenses for this software, and vendor will train Court IT staff on its use.

1.4 Special Requirements

An extensive knowledge of all features available in Word 2007 is required. This knowledge must include: macros, templates, importing names/addresses from the Outlook Address Book or other Windows address book, merge files, creating keyboard shortcuts, and any other functionality described in Task 3. Vendor must also have extensive knowledge of conversion software to be used by vendor to convert court documents and macros.

Task 2: **Conversion - Documents**

2.1 Introduction

The U.S. District Court for the Southern District of Alabama has been using Corel WordPerfect as its word processing system for the last 22 years. Over the years, the Court has progressed, moving through each version of software as it has been released. Currently, the Court uses WordPerfect X3. The Court would like to move from WordPerfect to Microsoft Word 2007 as its standard word processing software for official documents.

2.2 Purpose

All, or a user-specified set, of each Chambers or Clerk's Office current WordPerfect files will be converted to Microsoft Office 2007.

2.3 Scope

Vendor will convert documents using vendor-supplied conversion software. Documents will be reviewed by vendor and designated Court staff for accuracy of conversion.

Vendor will convert all currently used Corel WordPerfect X3 Address Books to a Windows address book. These addresses will be accessible by the Envelope, Label, and Merge features in Word 2007.

Vendor will convert or recreate in Word 2007 all currently used WordPerfect X3 QuickWords to a comparable feature in Word 2007.

Vendor will recreate all current keyboard shortcuts used with the WordPerfect X3 DOS keyboard to comparable keyboard shortcuts in Word 2007.

2.4 Special Requirements

An extensive knowledge of all features available in Word 2007 is required. This knowledge must include: macros, templates, importing names/addresses from the Outlook Address Book or other Windows address book such as Lotus Notes, merge files, creating keyboard shortcuts, and any other functionality described in Task 3. Vendor must also have extensive knowledge of conversion software to be used by Vendor to convert court documents and macros.

Task 3: **Functionality**

3.1 Introduction

The U.S. District Court for the Southern District of Alabama has been using Corel WordPerfect as its word processing system for the last 22 years. Over the years, the Court has progressed, moving through each version of software as it has been released. Currently, the Court uses

WordPerfect X3. The functionality available in WordPerfect X3 must be made available in Microsoft Office 2007.

3.2 Purpose

Word 2007 must provide the functionality listed in Section 3.3 of the Statement of Work.

3.3 Scope

Vendor will demonstrate to Court IT staff that the following functionality is available in Word 2007:

- * Strikeout
- * Redline
- * Highlighting of Text
- * Text Justification
- * Center Text
- * Line Spacing Changes
- * Page Numbering – with suppress of page number on first page of document
- * Inserting Date Text - date does not change when document is opened
- * Insert File
- * Go To
- * Find and Replace
- * Hard Space - keeps text before and after space together
- * Change Case - initial caps, all caps, lower case characters
- * Undo/Redo
- * Copy/Paste - with Options
- * Make it Fit - automatically change formatting to make documents fit on a user-designated number of pages
- * QuickCorrect - add shortcuts for frequently used words (AutoCorrect)
- * Create Index
- * Create Table of Contents
- * Double Indent for Quotes
- * Footnotes
 - * Insert
 - * Use numbers or asterisk if only one footnote in document
 - * Change numbering of footnotes
 - * Editing
- * Inserting Graphic Lines and Graphics
- * Compare
- * Remove all markings from document at once so user does not have to remove each marking individually
- * Headers - including suppress header on first page
- * Footers
- * Inserting Symbols
- * Spell-As-You-Go

- * Creating keyboard shortcuts for frequently-used features
- * Envelopes - pulling in addresses from address book and storing return addresses
- * Labels - including using merge to create labels
- * Creating and Editing Tables
- * Creating and Editing Macros and Templates
- * Changing Screen Display (Draft mode in WordPerfect) - so that footers, headers, footnotes do not display
- * Creating a Default Page Setup - font, margins, justification
- * Setting Zoom Setting as Default
- * Sort
- * Print Page
- * Spell Checker
- * Widow/Orphan - keep lines of text together so that one line does not move to page by itself
- * Outline
- * Bullet or Numbered Lists
- * Publish to PDF and Retain Hyperlinks
- * Password Protect a Document
- * Creating and Editing Merge Files
- * File Stamp - add document name and path to footer
- * Reveal Codes - comparable features in Word

3.4 Special Requirements

An extensive knowledge of all features available in Word 2007 is required. This knowledge must include the features listed in Section 3.3 of the Statement of Work above.

B. DESCRIPTION OF DELIVERABLES

Description of Deliverables for Task 1:

Merge files and templates will be converted to Word 2007 merge files and templates. Templates will open, display, and print in Word 2007 in a format acceptable to the user. Merge files will be run and the documents/data resulting from the merge will display and print in Word 2007 in a format acceptable to the user.

Macros currently used in WordPerfect X3 will be converted or recreated in Word 2007. Macros will run and execute correctly in Word 2007. Keystroke macros in WordPerfect X3 will use the same keystrokes to run Word 2007. If the same keystroke commands cannot be used in Word 2007, user-designated keystrokes will be substituted by Vendor.

Conversion processes or conversion software will be provided by Vendor, and Vendor will provide pricing for any conversion software to be provided to the Court or demonstrate to Court IT staff how conversion process works so that processes or software can be used by Court staff

after completion of project.

Description of Deliverables for Task 2:

All documents designated by each unit will be converted from WordPerfect to Microsoft Word 2007. Documents will open, display, and print in Word 2007 in a format acceptable to user.

Names and addresses will be converted from the WordPerfect X3 Address Book to Windows Address Book in a format acceptable to the user. A test will be run by user and IT staff using the Envelope, Label, and Merge features in Word to assure that names/addresses are displayed and print correctly when these features are executed.

Vendor will convert or recreate in Word 2007 all currently used WordPerfect QuickWords to the comparable feature in Word 2007. User will test QuickCorrect features in Word 2007 to confirm that all QuickWords have been converted or recreated.

Vendor will recreate all current keyboard shortcuts used with the WordPerfect X3 DOS keyboard to comparable keyboard shortcuts in Word 2007. User will test keyboard shortcuts for commonly used features. If the same keystroke commands cannot be used in Word 2007, user-designated keystrokes will be substituted by Vendor.

Description of Deliverables for Task 3:

All functionality listed in Section 3.3 of the Statement of Work will be available to users.

C. SCHEDULE OF PERFORMANCE AND DELIVERY/MILESTONES

The project will begin as soon as possible after award of the contract. Vendor will immediately begin meetings with Court IT staff. Project must be completed no later than June 30, 2010.

Regular meetings will be scheduled between Vendor and Court IT staff to work out the details of task delivery. Scheduling of site visits for conversion (Task 1 and Task 2) will have to be established based on staff schedules.

D. REVIEW PERIOD FOR DELIVERABLES

Conversion software or processes will also be tested by Court IT staff to determine accuracy prior to any site visits.

Functionality will also be reviewed by Court IT staff to determine if it adequately meets the needs of Court users prior to any site visits.

E. ACCEPTANCE CRITERIA FOR DELIVERABLES

Conversion must create an accurately displayed and printed copy of the document converted so that the end user does not have to make any additional edits to the document.

Functionality must be available and accessible by end user in a manner acceptable to the end user.

F. ENVIRONMENT

All locations are in an office setting.

U.S. District Court for the Southern District of Alabama
113 Saint Joseph Street
Mobile, Alabama 36602

Government Furnished Material

All computers will have WordPerfect X3 and Microsoft Word 2007 loaded. If reference material for Word 2007 is needed (off-the-shelf books), it will be purchased by the U.S. District Court for the Southern District of Alabama for users.

Vendor will use the Court's training room and/or conference room. Overhead projection and a screen are available in the conference room and the training room provides for computer hook-up to a large flat-screen television.

If conversion software selected by Vendor is to be obtained from another source, the U.S. District Court for the Southern District of Alabama will purchase an adequate number of licenses for this software.

Parking, if available, will be provided at the Courthouse for the Vendor(s). Public parking is also available at the Courthouse for the Vendor(s).

Contractor Furnished Material

Vendor will provide conversion software for the project and will train U.S. District Court for the Southern District of Alabama IT staff on its use. If conversion software selected by Vendor is from another source, the U.S. District Court for the Southern District of Alabama will purchase an adequate number of licenses.

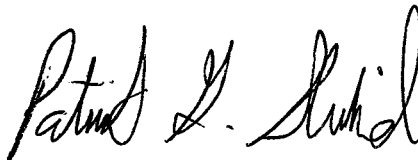
Meetings

Vendor will have regularly scheduled meetings with the Court IT Staff via video or audio conference, to work out the details of the conversion and any functionality issues. These meeting dates will be determined as soon as the project has been awarded.

Travel and Per Diem Requirements

Vendor will provide an estimate of travel expenses for site visits and meetings. If available at the time of the site visit or meeting, parking will be provided at the Courthouse for Vendor representatives.

Sincerely,

A handwritten signature in black ink, appearing to read "Patrick G. Shubird". The signature is fluid and cursive, with the first name "Patrick" being the most prominent.

Patrick G. Shubird
Contracting Officer

Attachment: "Provisions, Clauses, Terms and Conditions - Small Purchases. (OCT 2006)"

Provisions, Clauses, Terms and Conditions - Small Purchases (OCT 2006)

- (a) The following Judiciary Procurement Program Procedures provisions are incorporated by reference into the request for quotations (RFQ):
 - (1) Provision 3-90, "Late Submissions, Modifications and Withdrawal of Offers"(JAN 2003)
 - (2) Provision 7-60, "Judiciary Furnished Property or Services" (JAN 2003)
- (b) The contractor shall comply with the following Judiciary Procurement Program Procedures clauses incorporated by reference:
 - (1) Clause 2-60, "Stop Work Order" (JAN 2003)
 - (2) Clause 3-205, "Protest After Award" (JAN 2003)
 - (3) Clause 7-20, "Security Requirements" (JAN 2003)
 - (4) Clause 7-30, "Public Use of the Name of the Federal Judiciary" (JAN 2003)
 - (5) Clause 7-35, "Disclosure or Use of Information" (AUG 2004)
 - (6) Clause 7-85, "Examination of Records" (JAN 2003)
 - (7) Clause 7-130, "Interest (Prompt Payment)" (JAN 2003)
 - (8) Clause 7-135, "Payments" (JAN 2003) (Payment means acceptance by the inclusion of this clause.)
 - (9) Clause 7-140, "Discounts for Prompt Payment" (JAN 2003)
 - (10) Clause 7-150, "Extras" (JAN 2003)
 - (11) Clause 7-185, "Changes" (JAN 2003)
 - (12) Clause 7-200, "Judiciary Delay of Work" (JAN 2003) (Applies for products and fixed-price services.)
 - (13) Clause 7-210, "Payment for Emergency Closures" (AUG 2004)
 - (14) Clause 7-235, "Disputes" (JAN 2003)
- (c) The contractor shall comply with the following clauses, incorporated by reference, unless the circumstances do not apply:
 - (1) Clause B-20, "Computer Generated Forms" (JAN 2003) (Applies when the contractor is required to submit data on standard or optional forms.)
 - (2) Clause 6-60, "Rights in Data - General" (AUG 2004) (Applies if data will be produced, furnished, or acquired under the purchase order.)
 - (3) Clause 7-145, "Government Purchase Card" (JAN 2003) (Applies when the CO determines that the purchase card can be used to make payments.)
 - (4) Clause 2-115, "Terms for Commercial Advance Payment of Purchases" (OCT 2006) (Applies if advance payment will be authorized.)
 - (5) Clause 2-115, Alt I (Applies if advance payment is authorized for photocopy equipment maintenance.)
 - (6) The following apply to products only:
 - a) Clause, 2-25A, "Delivery Terms and Contractor's Responsibilities" (JAN 2003) (Purchase order will specify whether delivery is expected at destination or origin.)
 - b) Clause, 2-45, "Packaging and Marking" (AUG 2004) (Applies to fixed-price products or for a service involving furnishing of products.)
 - c) Clause, 3-155, Walsh-Healey Public Contracts Act (JAN 2003) (Applies to product procurements over \$10,000 for manufacturing or

furnishing products)

(7) The following apply to services only:

- a) Clause 1-1, "Employment by the Government"(JAN 2003)
- b) Clause 1-5, "Conflict of Interest" (AUG 2004)
- c) Clause 3-160, "Service Contract Act of 1965, as amended" (JAN 2003) (Applies if the purchase order amount is over \$2,500 and will require the use of service employees.)
- d) Clause 3-170, "Statement of Equivalent Rates for Federal Hires"(JAN 2003) (Applies if the purchase order amount is more than \$2,500 and will require the use of service employees.)
- e) Clause 7-40, "Judiciary-Contractor Relationship"(JAN 2003)(Applies to services when not involving judiciary information technology funds.)
- f) Clause 7-65, "Protection of Judiciary Buildings, Equipment and Vegetation" (JAN 2003) (Applies when services are performed at a judiciary installation.)
- g) Clause 7-205, "Payment for Judiciary Holidays" (JAN 2003) (Applies to time-and-materials or labor-hour contracts.)

(d) Inspection/Acceptance

The contractor shall tender for acceptance only those products and/or services that conform to the requirements of this contract. The judiciary reserves the right to inspect or test any products or services that have been tendered for acceptance. The judiciary may require repair or replacement of nonconforming products or re-performance of nonconforming services at no increase in contract price. The judiciary must exercise its post-acceptance rights:

- (1) within a reasonable period of time after the defect was discovered or should have been discovered; and
- (2) before any substantial change occurs in the condition of the item, unless the change is due to the defect in the item.

(e) Excusable delays

The contractor shall be liable for default unless nonperformance is caused by an occurrence beyond the reasonable control of the contractor and without its fault or negligence, such as acts of God or the public enemy, acts of the government in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, unusually severe weather, and delays of common carriers. The contractor shall notify the contracting officer in writing as soon as it is reasonably possible after the commencement of any excusable delay, setting forth the full particulars in connection therewith, shall remedy such occurrence with all reasonable dispatch, and shall promptly give written notice to the contracting officer of the cessation of such occurrence.

(f) Termination for the judiciary's convenience

The judiciary reserves the right to terminate this contract, or any part hereof, for its sole convenience. In the event of such termination, the contractor shall immediately stop all work hereunder and shall immediately cause any and all of its suppliers and subcontractors to cease work. Subject to the terms of this contract, the contractor shall be paid a percentage of the contract price reflecting the percentage of the work performed prior to the notice of termination, plus reasonable charges that the contractor can

demonstrate to the satisfaction of the judiciary, using its standard record keeping system, have resulted from the termination. The contractor shall not be required to comply with the cost accounting standards or contract cost principles for this purpose. This paragraph does not give the judiciary any right to audit the contractor's records. The contractor shall not be paid for any work performed or costs incurred that reasonably could have been avoided.

(g) Termination for cause

The judiciary may terminate this contract, or any part hereof, for cause in the event of any default by the contractor, or if the contractor fails to comply with any contract terms and conditions, or fails to provide the judiciary, upon request, with adequate assurances of future performance. In the event of termination for cause, the judiciary shall not be liable to the contractor for any amount for products or services not accepted, and the contractor shall be liable to the judiciary for any and all rights and remedies provided by law. If it is determined that the judiciary improperly terminated this contract for default, such termination shall be deemed a termination for convenience.

(h) Warranty

The contractor warrants and implies that the items delivered hereunder are merchantable and fit for use for the particular purpose described in this contract.

**Note: All Provisions and Clauses referenced above can be found in their entirety at
*<http://www.uscourts.gov/procurement/clauses.htm>***